

## **DPAS EUREKA TRAINING MANUAL**

- I. The DPAS Eureka Training Manual is changed as follows:  
Remove pages listed below and insert revised pages.

### **Remove Old**

### **Insert New**

#### **CHAPTER TWO**

27 thru 28  
51 thru 54

Same  
Same

#### **CHAPTER THREE**

i thru ii  
67 thru 70  
85 thru 86  
91 thru 92  
101 thru 102  
107 thru 108  
113 thru 118

Same  
Same  
Same  
Same  
Same  
Same  
Same

#### **CHAPTER FOUR**

165 thru 165

Same

#### **CHAPTER FIVE**

179 thru 180

Same

#### **REFERENCES**

201 thru 202  
213 thru 214

Same  
Same

II. **SIGNIFICANT CHANGES**

Revision represents minor corrections.

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7. In Step 5 **Select Columns to Aggregate** name 3 aggregate functions you can perform.

- a. \_\_\_\_\_ c. \_\_\_\_\_  
b. \_\_\_\_\_

8. When working with QuickQuery, you can only work in one business view at one time? **(True or False)**

True \_\_\_\_\_ False \_\_\_\_\_

**Discussion Questions:**

1. **Review the use of the Business Views and Folders.**
2. **Why is it important to use the filter function in some reports?**
3. **Discuss the different types of queries and what would be an example of how you would use them.**

## Practical Exercise: QuickQuery With The Query Wizard

### Independent Student Report

**Unit of Study:** Building a QuickQuery With The Query Wizard

**Application:** This type of query can be used when you need a simple report fast.

**Report Type:** Accounting report, filtered by UIC displaying serial number, stock number, fund code and dollar amount with sum and average.

### Instructions:

1. Create a new report using the QuickQuery Wizard.
2. Select the following fields for your QuickQuery Wizard report:

BUSINESS VIEW: CATALOG	
FOLDER(S)	DATA ELEMENT(S)
Catalog	Stock Nbr Generic Nomen
Mfr._Model/Part_Number	Mfr_Name Mfr Part Nbr

3. **Filter:**
  - Column:** Stock Nbr
  - Operator:** Like
  - Value1:** 70\*
4. **Sort:** Stock Nbr
5. Click on **Entire Document**.
6. **Aggregate:** Stock Nbr using **Count**



### HINT!

For your Filter: Remember to use the value of **"like"** because we are using the wildcard to look for Stock Numbers that begin with **"70"**. Refer to the list of operators on page 19.

## Building A Quick Filter In QuickQuery

**Unit of Study:** Creating Quick Filters in your QuickQuery Documents.

**Application:** Use this function when you want to reduce the amount of detail information on your query.

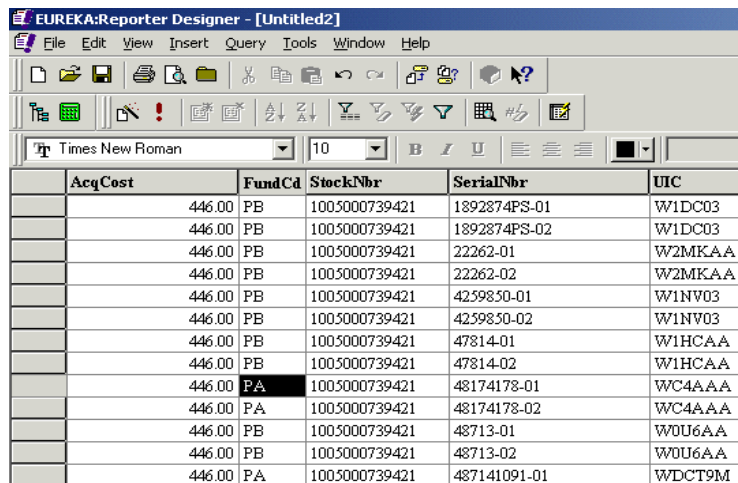
**Report Type:** UIC total dollar amounts under each individual fund code.

**Activity:** Student Hands-On with Instructor direction


### Instructions:

1. Open a new QuickQuery report without the wizard.
2. Depress the **F2 Function Key** if your object directory is not open.
3. Select the following fields for your QuickQuery report:

BUSINESS VIEW: DEPRECIATION EXPENSE		
FOLDER	DATA ELEMENTS	
Catalog	Stock Nbr	
Serial_Hand_Receipt	Acq Cst	Serial Nbr
	Fund Cd	UIC



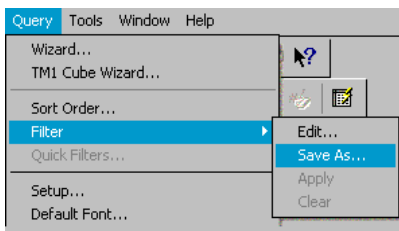
AcqCost	FundCd	StockNbr	SerialNbr	UIC
446.00	PB	1005000739421	1892874PS-01	W1DC03
446.00	PB	1005000739421	1892874PS-02	W1DC03
446.00	PB	1005000739421	22262-01	W2MKAA
446.00	PB	1005000739421	22262-02	W2MKAA
446.00	PB	1005000739421	4259830-01	W1NV03
446.00	PB	1005000739421	4259830-02	W1NV03
446.00	PB	1005000739421	47814-01	W1HCAA
446.00	PB	1005000739421	47814-02	W1HCAA
446.00	PA	1005000739421	48174178-01	WC4AAA
446.00	PA	1005000739421	48174178-02	WC4AAA
446.00	PB	1005000739421	48713-01	W0U6AA
446.00	PB	1005000739421	48713-02	W0U6AA
446.00	PA	1005000739421	487141091-01	WDC9M

4. In the Fund Code Column, highlight one cell of Fund Code **PA**.
5. Click on  (Apply Filter Icon). This will apply a filter to the current section. This action will automatically filter your report to show only the assets with the fund code of PA.

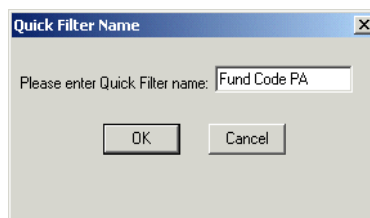
## Example of the finished report:


AcqCost	FundCd	SerialNbr	StockNbr	UIC
446.00	PA	48174178-01	1005000739421	WC4AAA
446.00	PA	48174178-02	1005000739421	WC4AAA
446.00	PA	487141091-01	1005000739421	WDCT9M
446.00	PA	487141091-02	1005000739421	WDCT9M
446.00	PA	58972LKF-01	1005000739421	W4T809
446.00	PA	58972LKF-02	1005000739421	W4T809
446.00	PA	FE29875-01	1005000739421	W0U2AA
446.00	PA	FE29875-02	1005000739421	W0U2AA
446.00	PA	HTE0919-01	1005000739421	W46907
446.00	PA	HTE0919-02	1005000739421	W46907
446.00	PA	KF891274-01	1005000739421	W4XQAA
446.00	PA	KF891274-02	1005000739421	W4XQAA
446.00	PA	XSW9U001-01	1005000739421	WBZTAA
446.00	PA	XSW9U001-02	1005000739421	WBZTAA
316.00	PA	32525-01	1005006789828	W4T809
316.00	PA	32525-02	1005006789828	W4T809
316.00	PA	489714R-01	1005006789828	WDCT9M
316.00	PA	489714R-02	1005006789828	WDCT9M
316.00	PA	5768890900-01	1005006789828	WC4AAA
316.00	PA	5768890900-02	1005006789828	WC4AAA
316.00	PA	RQ222-01	1005006789828	W0U2AA
316.00	PA	RQ222-02	1005006789828	W0U2AA
316.00	PA	RT29901-01	1005006789828	W46907
316.00	PA	RT29901-02	1005006789828	W46907
316.00	PA	T28949-01	1005006789828	WBZTAA
316.00	PA	T28949-02	1005006789828	WBZTAA
316.00	PA	TU15908-01	1005006789828	W4XQAA
316.00	PA	TU15908-02	1005006789828	W4XQAA
385.00	PA	48971131-01	1005013368265	W0U2AA
385.00	PA	48971131-02	1005013368265	W0U2AA
		525258DT-01	1005013368265	W4T809

- At the menu bar, select **Query>Filter>Save As**.

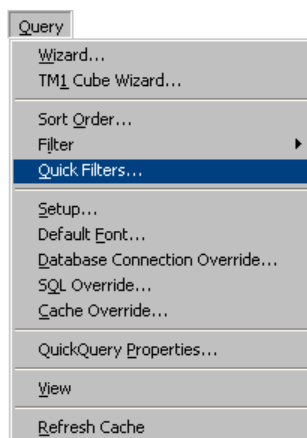


- The Filter Name Screen will come up. Enter **Fund Code PA** in the window.



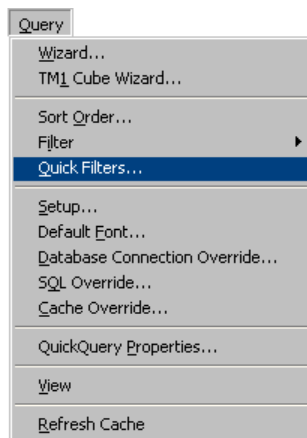
- Click **OK**.
- Click on  (Clear Filter Icon). This action will clear your document of the Quick Filter.

- At the menu bar select **Query>Quick Filters...**



This will bring up the Quick Filter Screen that will list your Quick Filter. From here you can select the listed filter and it will apply it to your document.

- Highlight **Fund Code 98**.
- Click **OK**. Your document is now filtered again by the fund code of 98.



- Clear the filter by using the Clear Filter Icon.
- Repeat the process for Fund Code PA (start at Step 4 through Step 8).
- After filtering by PA, save your report as **QQFILTER**, we will be using it in the next exercise.

# Building Translate Values Using QuickQuery

**Unit of Study:** Creating Translate Values within a Document.

**Application:** Value translations allow you to substitute one value for another.

You can use value translations to:

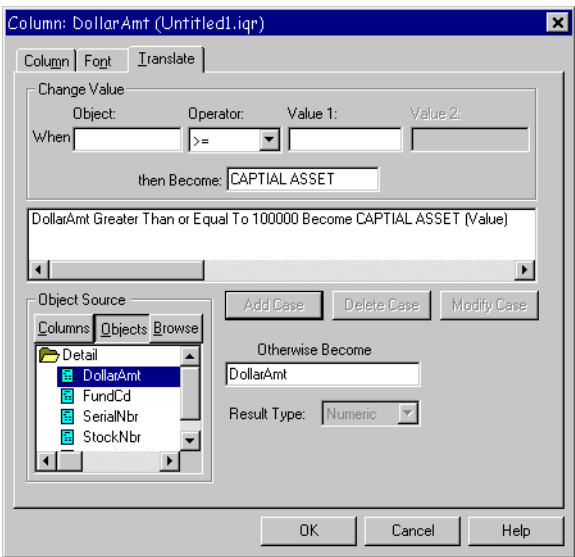
- Replace a technical term or code with a familiar term
- Draw attention to a significant value
- Add more information about certain values
- Express a numerical month as an alphabetic month

**Report Type:** Continuation of fund code report (QQFILTER) translating dollar amount.

**Activity:** Student Hands-On with Instructor direction

**Instructions:**

1. If closed, open **QQFILTER** report.
2. Double-click on the Dollar Amt column heading.
3. The Column Dollar Amt window will appear.
4. Select the **Translate** tab.
5. Double-click on the **Detail** folder in the Object Source.
6. Double-click on **Dollar Amt** to move it to the Object field.
7. Set the Operator to **>=** (**greater than or equal to**).
8. Enter **100000** in Value1.
9. **Then Become:** Enter "**CAPTIAL ASSET**".
10. Click Add Case.
11. **Otherwise Become:** Enter "**NON-CAPITAL**".



Cases	
Add Case	Activates your condition.
Delete Case	This will remove an existing condition. You will need to highlight the case first before you select this button.
Modify Case	This will allow you to make a change to an existing condition. You will need to highlight the case first before you select this button.

## Chapter Three Table of Contents

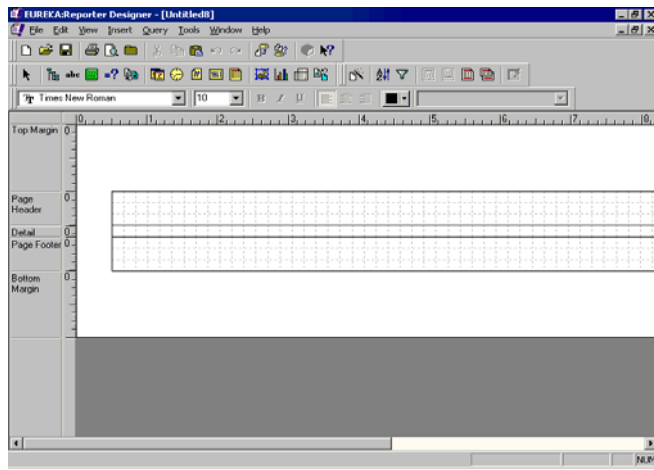
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## FreeForm Windows

FreeForm windows give you access to all object types and object attributes that Eureka supports.

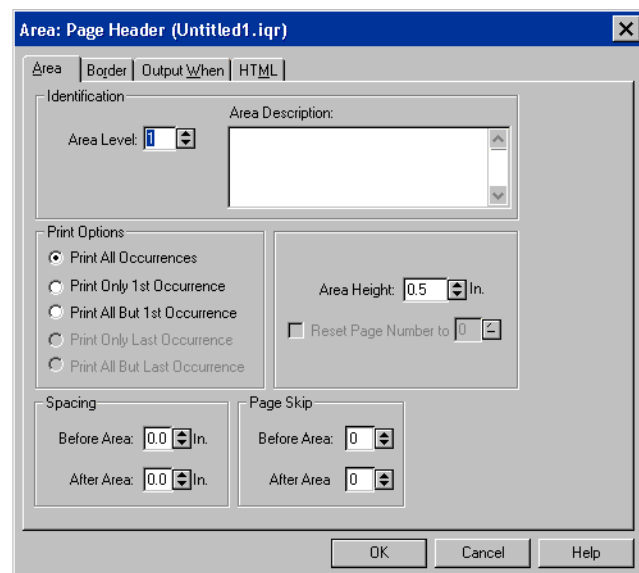


FreeForm Window	
<b>Areas</b>	These are defined as area objects that make up each Eureka document. Each area object serves as a container for output objects such as text objects, column objects, graphic objects, etc.
<b>Object Alignment Grid</b>	Eureka Reporter Designer provides a grid that is used to align your output objects.
<b>Page Header Area</b>	A page header is included at the top of each page. When you move an object (field) in this area Eureka outputs the value of that column, taken from the first row, on the page.
<b>Detail Area</b>	The output for a detail area is once for each database row included on your document.
<b>Page Footer Area</b>	A page footer is included at the bottom of each page. When you move an object (field) in this area, Eureka outputs the value of that column, taken from the last row, on the page.

## Changing Area Attributes

By double-clicking an Area, you can change certain attributes.

- Area Level:** Change this when you use the same area multiple times. This will designate the process order. For example, you may have two detail areas.
- Area Description:** This is the description of the area. This description does not print on the report.
- Print Options:** This is used in conjunction with multiple area levels. This will tell when certain rows to print.
- Area Height:** This sets the area height of your report.
- Reset Page Number to:** This will reset the page number after each page break, area, or group. For example, if your report breaks for each Hand Receipt Holder Number, it would reset the page back to whatever page number you specify.



- f. **Spacing:** If you want to leave space before or after an area object, enter the amount of space you want.
- g. **Page Skip:** Use these controls to have *Eureka* skip to the top of the next page before or after this area is output. A value of 1 causes output to skip to the next page. A value of 2 causes a blank page to be output. A value of 3 causes 2 blank pages to be output, etc.
- h. Click **OK**.

## **Object Directory**

The Object Directory makes it easy to:

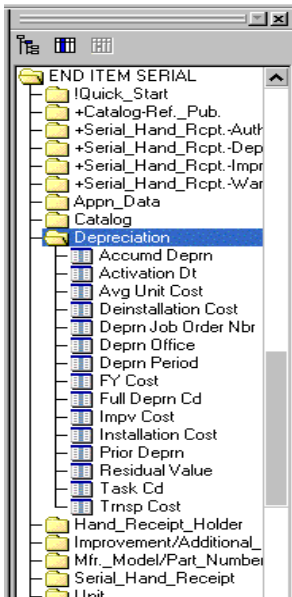
- ☐ Add columns to your documents and dialog boxes
- ☐ Add copies of existing objects to your document
- ☐ View database values for a column and insert them in dialog boxes

*Eureka* Reporter Designer includes an Object Directory in the FreeForm windows. You can open and close it by selecting **View>Object Directory (F2 Function Key)** from the menu bar. Many *Eureka* dialog boxes also have Object Directories built into them.

Object Directories let you select:

- ☐ Objects from your Metadata file (that is, column objects and custom objects that are defined in the Metadata file).
- ☐ Objects that are already in place on your design document.

Many Object Directories also let you browse database values for a column.



**Business View.** Business view names are at the top level of the tree and are indicated in **ALL CAPS**. A business view is an object in your Metadata File that corresponds to the data for a particular part of your business.

**Folders.** A folder can correspond to a table in your database or it can be made up of columns from more than one table. It can also include custom objects--objects that are calculated from database columns.

**Data Objects.** These are the actual data elements that are used to make up your report.

## **Object Directory Toolbar**



**Columns.** This displays the Object Directory.



**Document Objects.** This displays the data fields that you selected on your report.

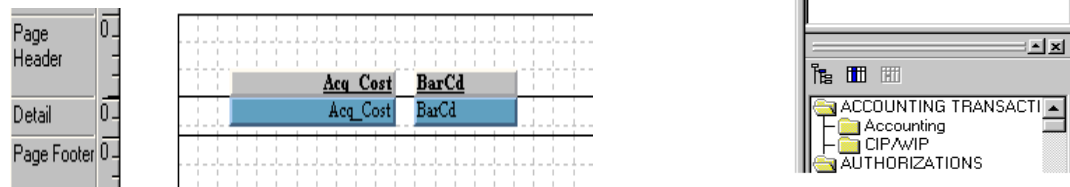


**Browse.** This browses your database for a selected data field (this is only accessible if a data object is selected).

## Area Object List

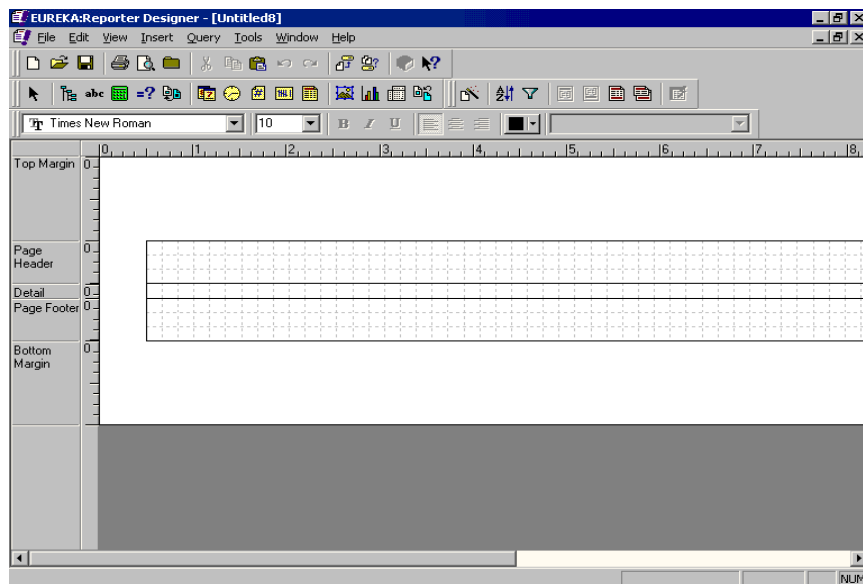
The Area Object List (**F4 Function Key**) is a tool that allows you to view area objects that are shown in your current FreeForm window. The Area Object List is displayed above your Object Directory.

## Data Object Placement



When dropping data objects on your report, column headings (the gray) will be placed in the page header area. Data objects (the turquoise), will be placed in the detail area. This is done by placing your mouse arrow on top of the data object in the object directory, holding down the left mouse button, dragging over to the grid area, and placing the tip of the arrow INSIDE the detail area. Let go of the mouse button. If the tip of the arrow is not inside the detail area, a column header will not be produced.

## Detail Areas

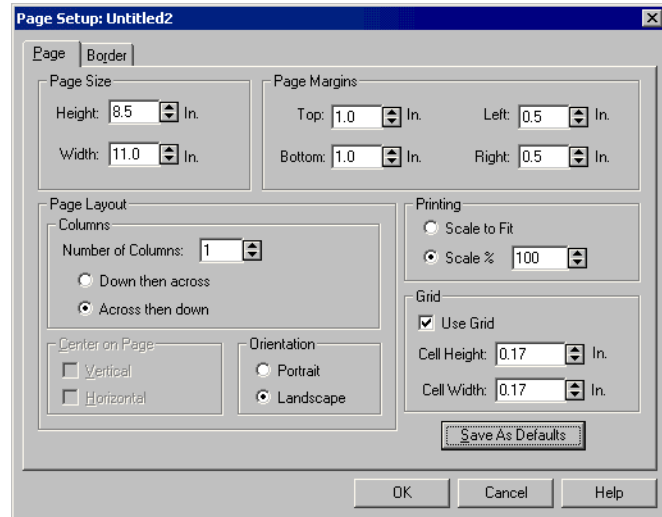


Placing data objects in the detail area will result in output once for each database row included on your document. If an aggregate function (sum, average, etc.) is applied to any of the columns in the detail area object, each row returned from the database is a summary row.

## Page Setup

Setting up your page allows you to do several page options, including titles, page numbers, layout, margins, borders, headers and footers, background images, etc.

- a. Select **File** from the menu bar.
- b. Select **Page Setup** from the program group.
- c. **Page Size:** Allows you to adjust the size of your page. Your page size is defaulted to the current Windows settings, but you can change if needed.
- d. **Page Margins:** Your page margins are defaulted to the current Windows settings, but you can change if needed.
- e. **Page Layout:** Allows you to use multiple columns.
- f. **Center on Page:** Select how you want your output displayed on your page.
- g. **Orientation:** This will allow you set how you want your page to print.



### Printing Group Box:

- h. **Scale to Fit:** Controls what happens when you print your document to paper with different dimensions than are specified for your document. When Scale to Fit is checked, Eureka scales the document to fit the page. It either enlarges or reduces all of the objects.
- i. **Scale:** Allows you to select an exact scaling percentage.



#### HINT!

If you plan to exchange documents between people with American and European printers, it is a good idea to turn on Scale to Fit.

- j. **Use Grid:** To assist in creating FreeForm documents with a neat appearance, you can specify that objects are to be placed on an alignment grid which appears only in the FreeForm window (and not in output).
- k. **Cell Height:** You can enter the vertical spacing for objects.
- l. **Cell Width:** Enter the horizontal spacing.

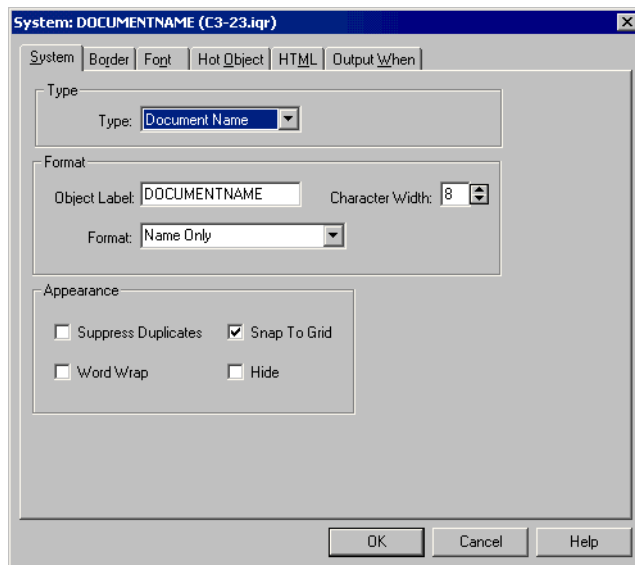
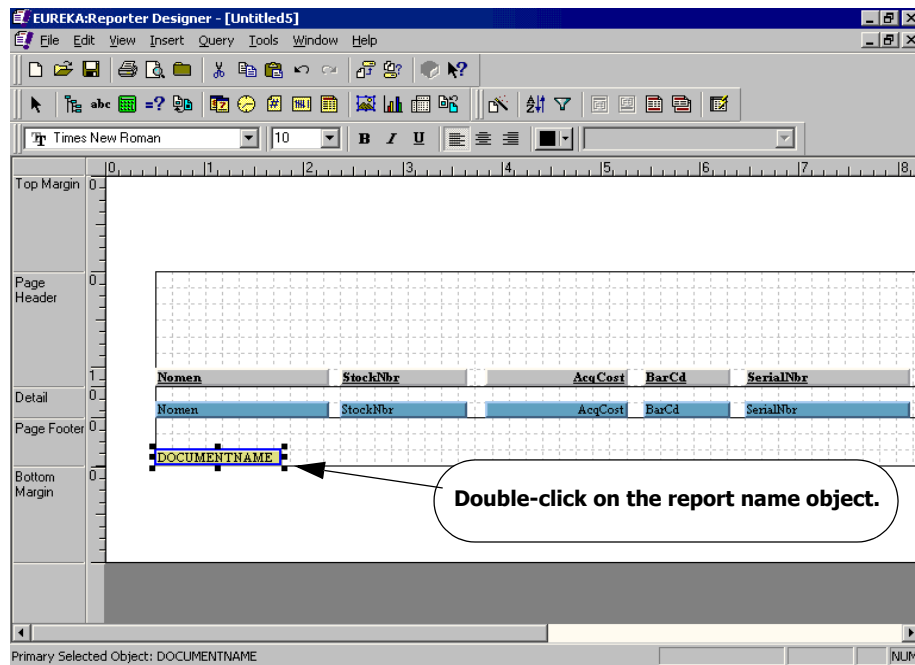


#### HINT!

A good starting point for cell height and width is 20% greater than the size of the font you plan to use most. For instance, if you plan to use a 10-point font, enter 12 points as the grid setting.

- m. **Save As Defaults:** To have your changes from the Page tab apply to future documents as well as to the current document, select **Save As Defaults** after making your changes. To have your changes apply only to future documents, select Cancel after you select **Save As Defaults**.
- n. Click **OK**.

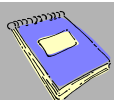
6. Double-click on the report name object.



7. Make any necessary changes.

**Type:** This displays the type of object.  
**Object Label:** This determines the type of value that is output for the object.  
**Character Width:** Controls the length of the object for output purposes. *Eureka* always provides a default width. If you enter a number smaller than the width of the system object as formatted by *Eureka*, the output will be truncated.  
**Format:** When you save your report, the file name will be displayed in the area where you placed the object.

- **Name Only** displays just the file name (for example, UICRPT).
- **Name and Extension** displays the entire file name including the extension (for example, UICRPT.iqr).
- **Full Path** displays the entire path and file name including the extension (for example, C:/Program Files/Reports/UICRPT.iqr).



## NOTE:

For the Character Width, truncation will also occur if the size of the object's output is larger than the object size. Factors that affect this include the typeface style and size, and the format applied to the object. You can avoid this truncation by selecting Word Wrap.

**Appearance:** Select the appearance option(s) for your report.

Appearance	
<b>Suppress Duplicates</b>	Outputs the same object contents only one time. When there is more than one consecutive row that has the same data for your object, Eureka suppresses output of duplicate values.
<b>Word Wrap</b>	If you want output that exceeds the object width to be printed on successive lines. The spacing between lines when objects wrap is based on the font you are using. When you select Word Wrap, be sure that there is enough room between the object you are defining and any objects directly below it in the same area to allow for multiple lines of text. Eureka does not add space under objects when they wrap.
<b>Snap To Grid</b>	If you want your object always to be placed on the alignment grid (when Use Grid is turned on). When Snap to Grid is not selected, you can place your object at any location.
<b>Hide</b>	If you want your object to be moved to a hidden area object. If you do so, your object will not be included in your output.

8. Click **OK**.

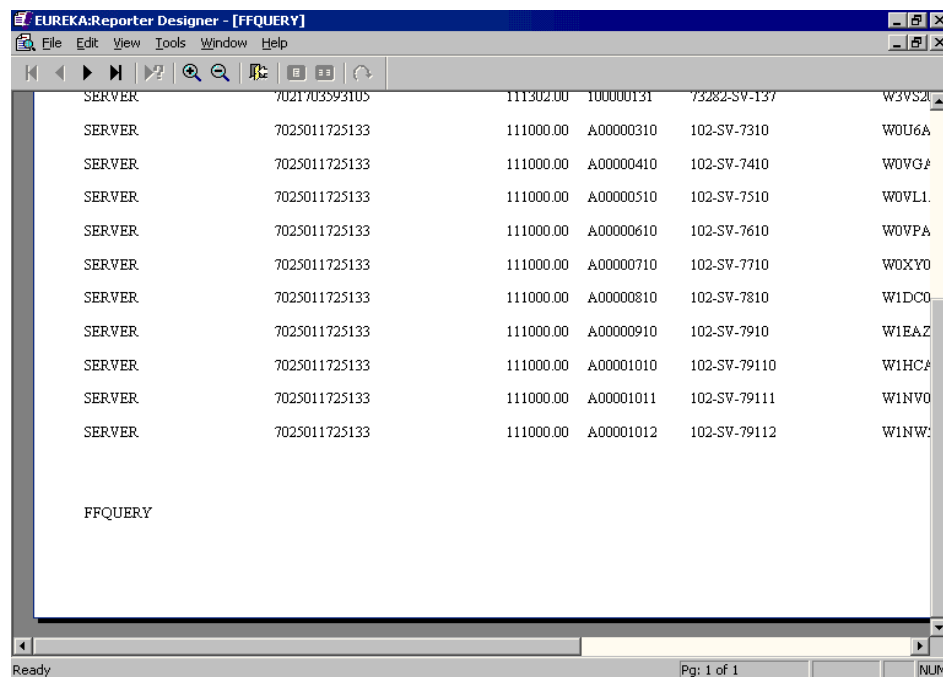


### HINT!

Remember...you can change the characteristics of your report name object (such as font size, color, add borders, etc.).

9. Process your report.

**Below is a sample of a finished FreeForm report displaying the document file name:**



10. Save your report.

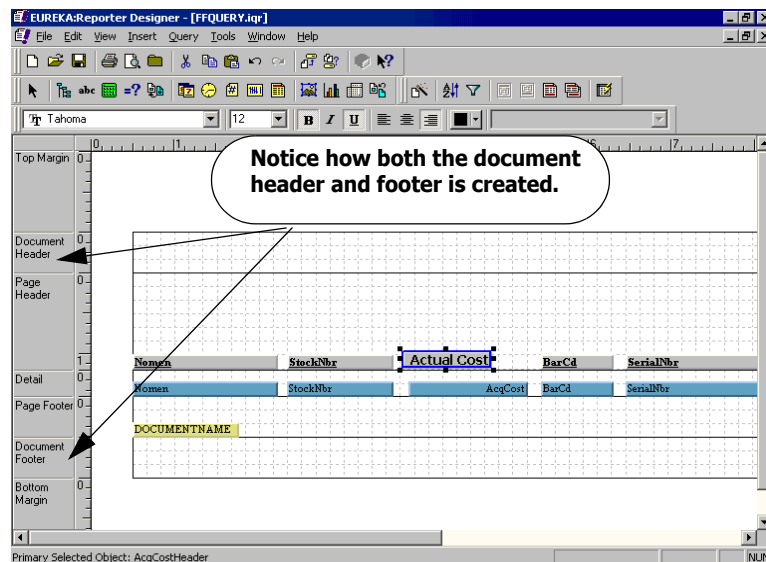
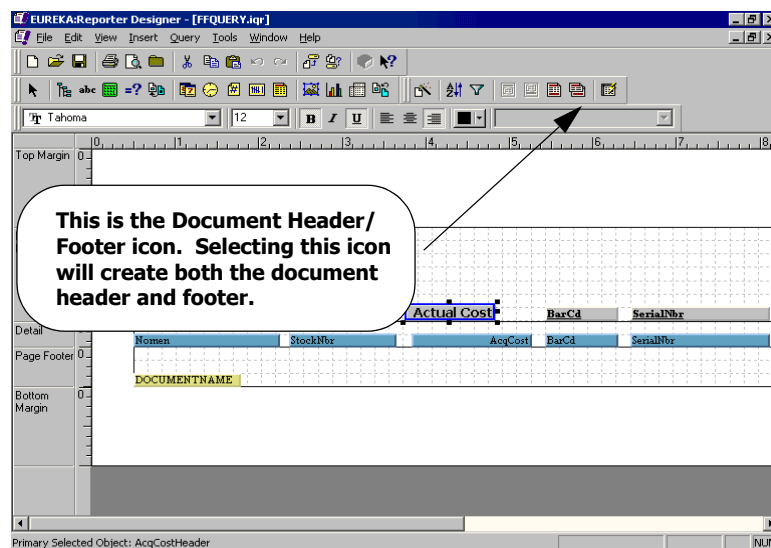
### Document Header/Footer Areas

A Document Header/Footer area outputs for the entire document. Placing objects in these areas will result in output values for the document as a whole (i.e., average, sum, text, etc.). Document header outputs for the first page only. The document footer outputs for the last page only.

1. Click on the **Document Header/Footer** icon.

**-OR-**

2. Select **Insert** from the menu bar.
3. Select **Area** from the program group.
4. Select **Document Header** or **Document Footer** from the program list; this will allow you to insert either the document header or the document footer, depending on which area you selected.





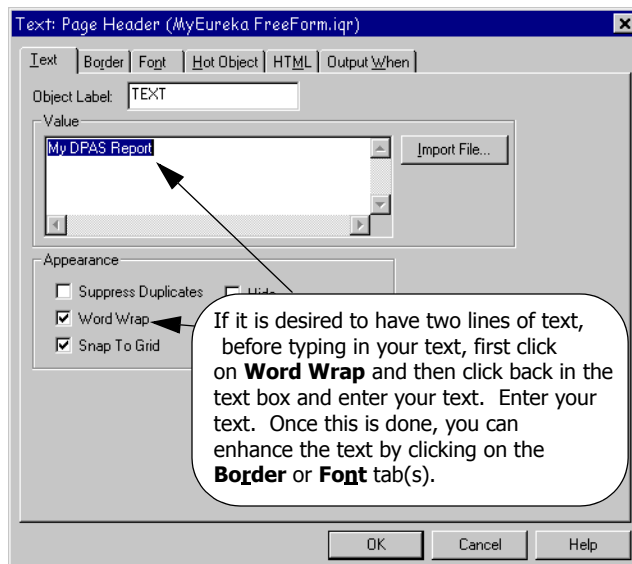
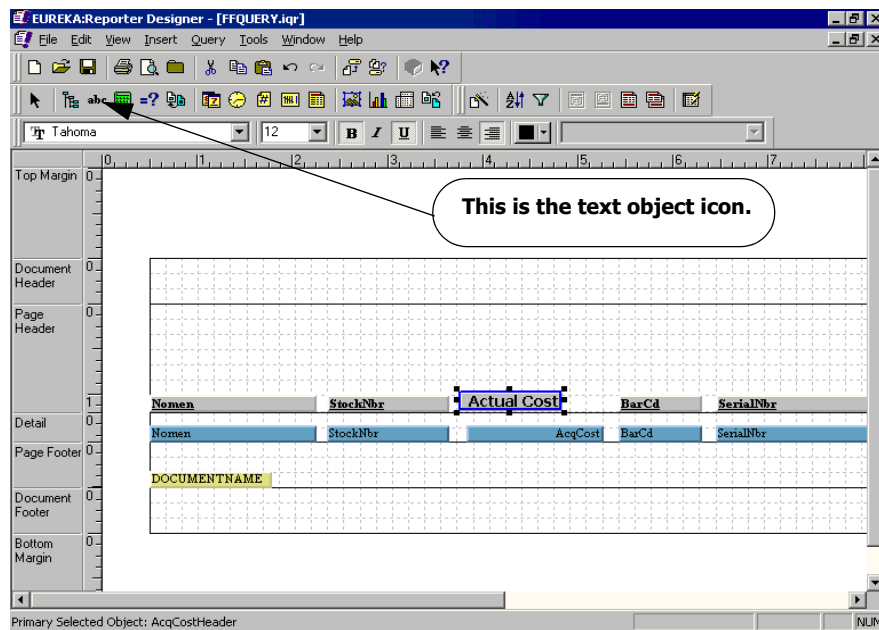
## Adding Text Objects

Use this process when you want to add your own text to your report. For example, use a text object to add titles, signature blocks, etc.

1. Click on the text icon.

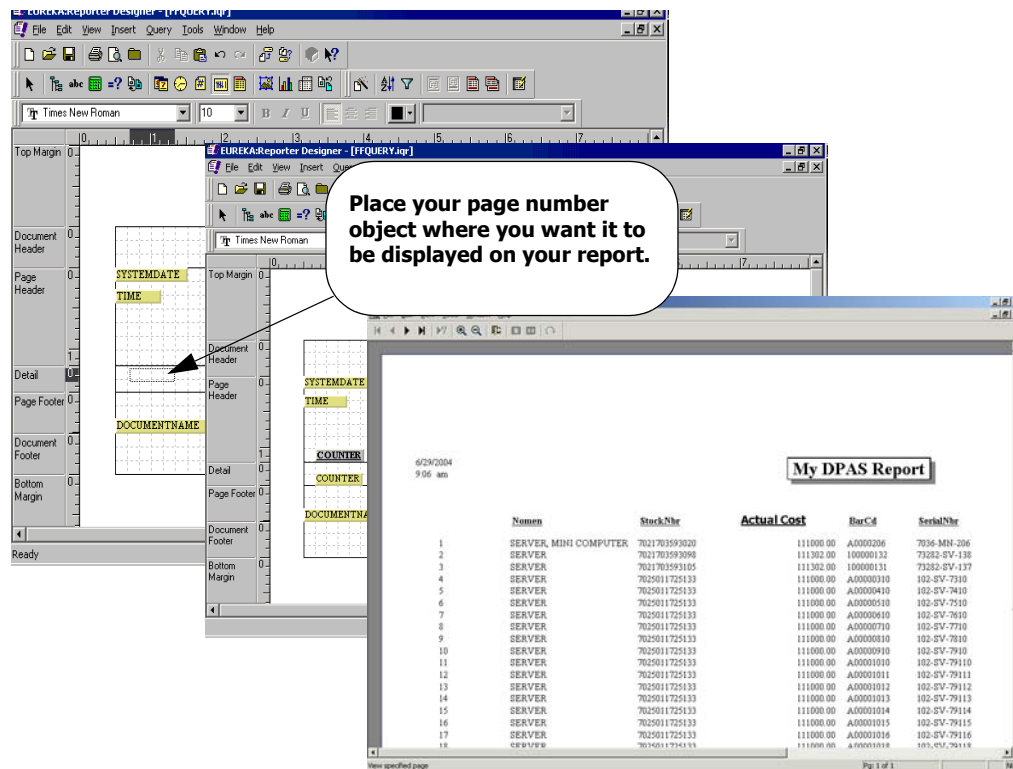
**-OR-**

2. Select **I**nsert from the menu bar.
3. Select **T**ext from the program group.



4. Do not change the Object Label.
5. In the **Value** window, enter the desired title for your report.
6. Click **OK**.
7. Place the text object in the center of the Page Header area of your report.

### 8. Process your report.



9. Close the report viewer.
10. Save your report.
11. Close your report.



### HINT!

If you place the counter object in the detail area, you may want to delete the column heading.

## Activity: Designing A Customized FreeForm Report Without The Query Wizard

### Student Hands-On With Instructor Direction

**Unit of Study:** Designing A Customized FreeForm Report

**Application:** In this activity, your instructor will guide you through building a listing of Hand Receipt Holders for a specified UIC using the FreeForm method of query and functions to customize your report.

**Report Type:** Hand Receipt Holder By UIC

### **Instructions:**

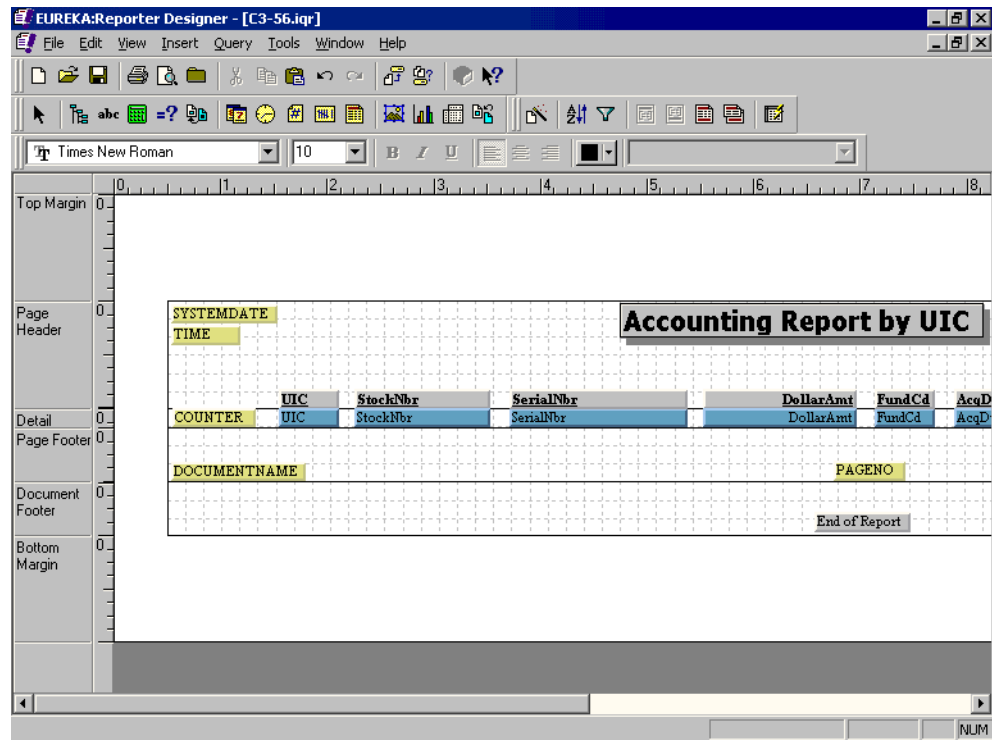
1. Create a new FreeForm report.
2. Enlarge your Page Header.
3. Using the counter icon insert counter in the Detail area.
4. Delete the Counter column heading.
5. Select the following fields for your FreeForm report:

<b>BUSINESS VIEW: HAND RECEIPT HOLDER</b>	
<b>FOLDER(S)</b>	<b>DATA ELEMENT(S)</b>
<b>Hand Receipt Holder</b>	HRH Nbr Mjr      Office Name HRH Name
<b>Unit</b>	UIC

6. Insert the date and time in the Page Header area.
7. Using the text box icon, give your document a title name and customize with fonts, etc., and place in the Page Header area.
8. Add a Document Footer area.
9. Add "**End of Report**" in the Document Footer.
10. Insert the document name, using the document name icon, in the Page Footer area.
11. Using the page number icon, insert a page number in the page footer.

## Practical Exercise: Designing A Customized FreeForm Report Without The Query Wizard

- Save the report as **FFPE1** for later use.



- Print (if a printer is available) the report for the Instructor.
- Close your report.

### Example of the finished report:

The screenshot shows the EUREKA:Reporter Designer window with the title bar 'EUREKA:Reporter Designer - [C3-56]'. The menu bar includes File, Edit, View, Tools, Window, and Help. The toolbar contains various icons for report design. The report output is displayed in a table format. The title 'Accounting Report by UIC' is in a bold box. The report includes a date and time stamp '8/9/2002 8:18 am'. The table has columns for UIC, StockNbr, SerialNbr, DollarAmt, FundCd, and AcqDt. The status bar at the bottom shows 'View specified page' and 'Pg: 1 of 1'.

	UIC	StockNbr	SerialNbr	DollarAmt	FundCd	AcqDt
1	HQ1001	7025011725133	564A634563446	110000.00	C1	20010314
2	N00204	7025011725133	721-SV-0001	110000.00	98	20010314
3	N00210	7025011725133	721-SV-0002	110000.00	98	20010314
4	N00216	7025011725133	721-SV-0003	110000.00	98	20010314
5	N00281	7025011725133	721-SV-0004	110000.00	98	20010314
6	N00750	7025011725133	721-SV-0005	110000.00	98	20010314
7	N00948	7025011725133	721-SV-0006	111000.00	98	20010315
8	N09239	7025011725133	721-SV-0007	111000.00	98	20010315
9	N09251	7025011725133	721-SV-0008	110000.00	98	20010315
10	N10151	7025011725133	721-SV-0009	110000.00	98	20010315
11	N31954	7025011725133	721-SV-00010	111000.00	98	20010315
12	N32739	7025011725133	721-SV-00011	111000.00	98	20010315
13	N35970	7025011725133	721-SV-00012	110000.00	98	20010315
14	N45679	7025011725133	721-SV-00013	110000.00	98	20010315
15	N60508	7025011725133	721-SV-00014	111000.00	98	20010315
16	N61665	7025011725133	721-SV-00015	111000.00	98	20010315
17	N61690	7025011725133	341BL00016	110000.00	98	20010315
18	N61690	7025011725133	341BL00016	110000.00	98	20010315

## Building A Sort Order In A FreeForm Report

**Unit of Study:** Building a sort order in a FreeForm report when you want to sort items in your report. *Eureka* Reporter Designer lets you sort your document or chart by any column or columns that you use in it. By default, sorts are ascending. If you wish to define a descending sort, you will have to select it by one of the methods you will learn in this course.

**Application:** This will show you how to sort in ascending or descending order, any field in your report.


**Report Type:** Asset listing by UIC and major hand receipt holder number.

**Activity:** Student Hands-On with Instructor direction

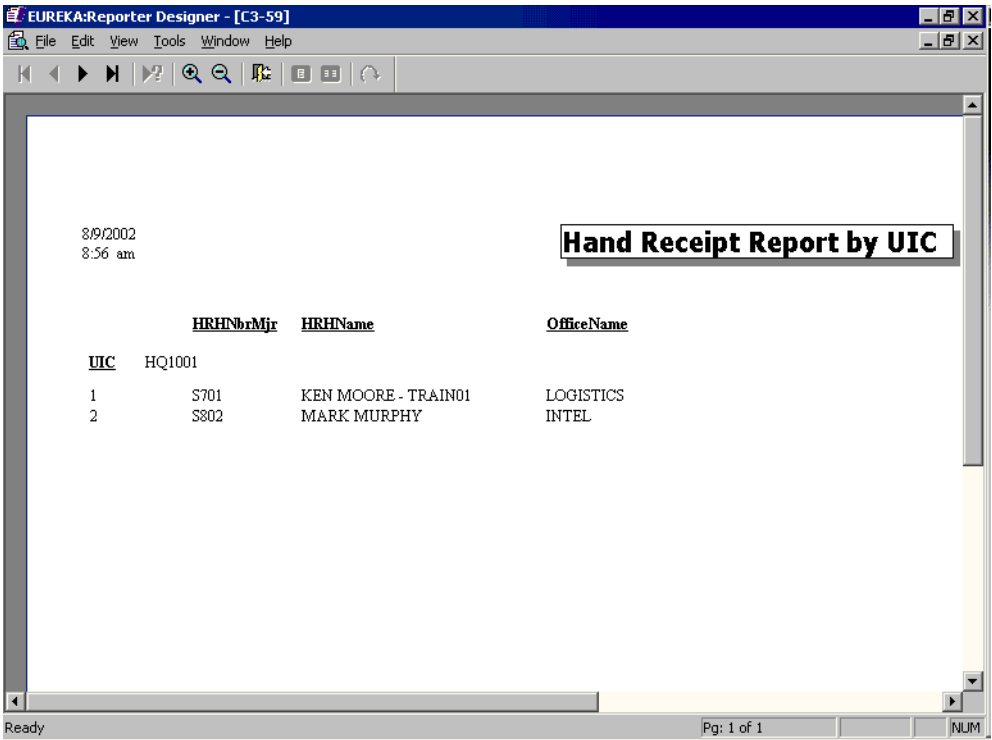
### Instructions:

1. Create a new FreeForm report.
2. If your object directory is not open, depress the **F2 Function Key**.
3. Select the following fields for your FreeForm report:

BUSINESS VIEW: HISTORIES		
FOLDER(S)	DATA ELEMENT(S)	
History	UIC	Serial Nbr
	HRH Nbr Mjr	Pgm Desc
	Stock Nbr	

4. Process report for viewing.
5. Close the output window.
6. Click .
7. Highlight the **HRH Nbr Mjr** field.

13. **DO NOT** close the report – we will continue to use it in the next Unit of Study.



## Building A Page Break In A FreeForm Report

**Unit of Study:** Often a single document consists of sections that need to have individual page numbers. For instance, a single document might consist of hundreds of (HRH) Hand Receipt Holder Reports, each to be distributed to a different HRH. When you do this, you would probably want to have:

1. Each HRH Report or UIC report starting at the top of a new page.
2. Each time a new UIC is reached, page numbering re-starting from one.

You can do this in a FreeForm window by including a group header area based on HRH Mjr. Nbr. For that area object, you would enter 1 under **Page Skip Before Area** on the Area tab of the Area dialog box. This causes one page break before the area is output. You would also check the **Reset Page Number To** box and then enter 1 as the number to which to reset the page numbering.

You can use these controls for a variety of purposes. For instance, if you want group footers on a page without any other area objects, you could enter 1 under both **Page Skip Before Area** and **Page Skip After Area**. If you wanted document totals on a separate page, you could enter 1 under **Page Skip Before Area** in the Area dialog box for the document footer area.

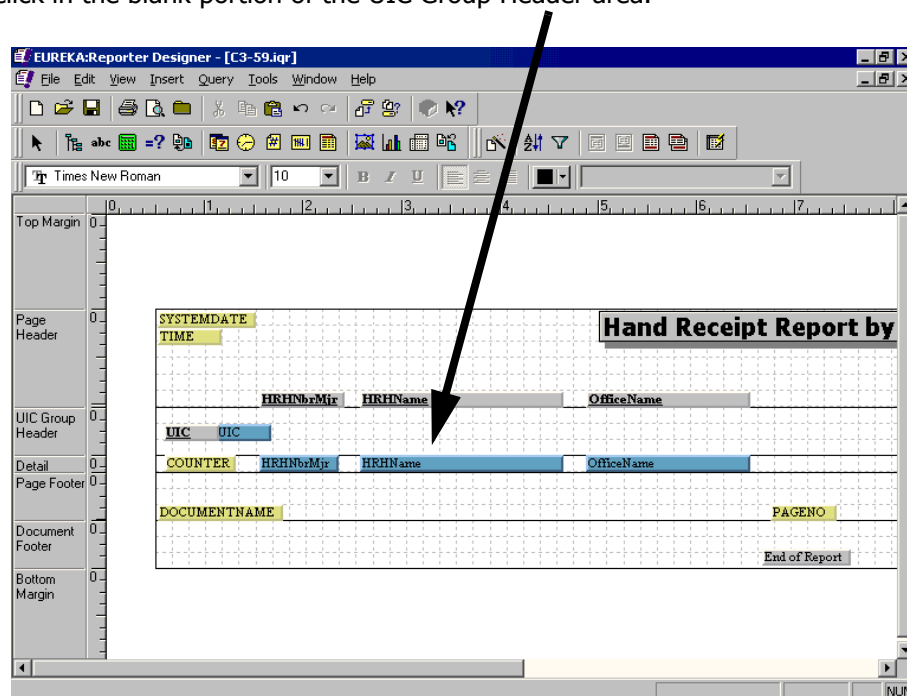
**Application:** This report will show you how to insert a page break every time a new UIC is encountered.

**Report Type:** Hand Receipt Holder by UIC (FFACTY)

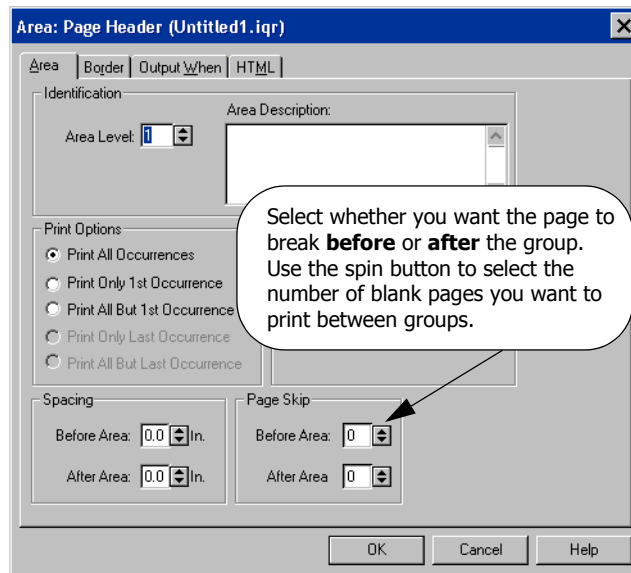
**Activity:** Student Hands-On with Instructor direction

### Instructions:

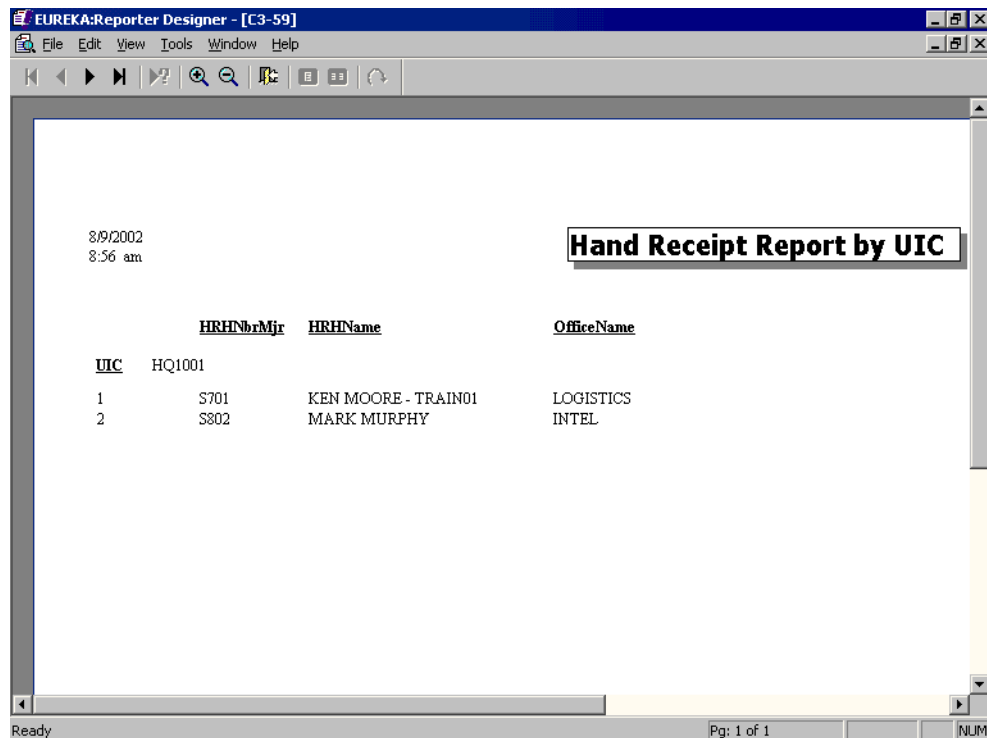
1. If closed, open the **FFACTY** report.
2. Double-click in the blank portion of the UIC Group Header area.



3. In the Page Skip group, change **Before Area** from 0 to 1.



4. Click **OK**.
5. Save your report.
6. Process your report to view the results.



7. Close your report.



## Inserting A Filter In A FreeForm Report

**Unit of Study:** Each document always has a single **base** filter. This base filter is always in effect and initially has no conditions defined for it and performs no filtering. You can add conditions incrementally to narrow the focus of your query. Unless query filtering conditions are applied, *Eureka* presents all of the rows in the database as part of the output. If the database is large, however, such output can be difficult to present and understand. Filter conditions help to narrow down output so that it included only relevant database rows.

**Application:** Filtering conditions to narrow down output so that only relevant data base rows are presented in the document output.


**Report Type:** This report will list only computers that were manufactured by DELL and/or GATEWAY.

**Activity:** Student Hands-On with Instructor direction

### Instructions:

1. Open a new FreeForm report.
2. In **Page Setup**, make sure that the **Height** is set to **8.5** and the **Width** is set to **11**.
3. Enlarge the Page Header area an additional 3 blocks.
4. Select the following fields for your FreeForm report:


BUSINESS VIEW: END ITEM SERIAL	
FOLDER(S)	DATA ELEMENT(S)
<b>Mfr._Model/Part_Number</b>	Mfr Name
<b>Catalog</b>	Nomen Stock Nbr
<b>Serial_Hand_Receipt</b>	Acq Cost Serial Nbr
<b>Unit</b>	UIC

5. Add a title for your report, date, and time for your report to the Page Header area.
6. Add the document name and the page number to the Page Footer area.
7. Add a Group Header for the **MfrName**.
8. Move the MfrName column heading and data object into the Group Header area.
9. Select the filter icon  to display the filter dialog box.
10. Double-click on the **Detail** folder.
11. Double-click on **UIC** to move it to the Object Window.
12. Select the drop down arrow and chose "like" for the operator.
13. Enter **W\*** for the value. Remember to turn your **Caps Lock** on.
14. Click **Add**.
15. Double-click on **MfrName** Group Header.
16. Double-click on **MfrName** to move it to the Object Window.
17. Select the drop down arrow and chose "like" for the operator.
18. Enter **\*DELL\*** for the value. Remember to turn your **Caps Lock** on.



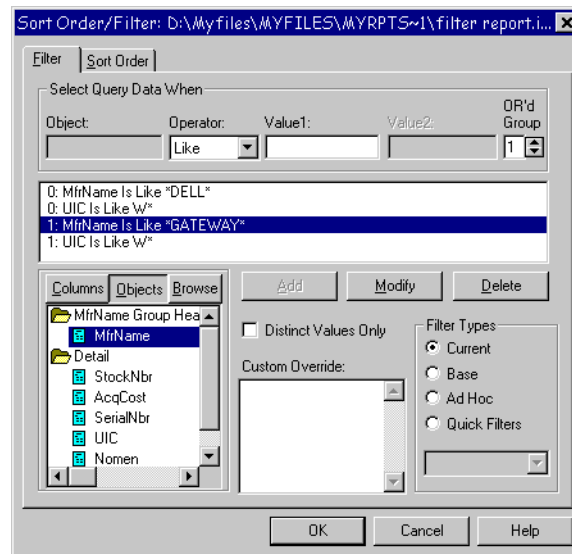
23. Close the output window.

Now, if we wanted to put another filter in to display information where the UIC began with **W** and the MfrName was **Gateway**, we would have to put in an **OR** condition.

24. Select the filter icon  to display the filter dialog box.
25. Double-click on **UIC**, from the Detail folder, to move it to the Object Window.
26. Select the drop down arrow and chose "like" for the operator.
27. Enter **W\*** for the value. Remember to turn your **Caps Lock** on.
28. Change the **OR'd Group** from 0 to 1. This will set an **OR** condition.
29. Click **Add**.
30. Double-click on **MfrName**, from the MfrName Group Header, to move it to the Object Window.
31. Select the drop down arrow and chose "**like**" for the operator.
32. Enter **\*GATEWAY\*** for the value. Remember to turn your **Caps Lock** on.

The **OR'd Group** should already be set to 1 since we changed it in the previous condition.

33. Click **Add**.



34. Click **OK**.



## NOTE:

By default, all the conditions of your query are **AND** operators (i.e., all conditions have to be met before it will return your results). However, you can connect your statements with **OR** operators, which divide your statements into groups. For example, if you wanted to set your conditions by **Stock Number AND Serial Number OR Bar Code**, the **OR'd Group** would be set to 0 (zero) for Stock Number and Serial Number, and set to 1 for Bar Code.

**Remember, the RULE is...**If the **OR'd Group** numbers on any two statements are the same, those two statements are connected by the **AND** condition. If the **OR'd Group** numbers on any two statements are different, those two statements are connected by the **OR** condition.

## STEPS TO PERFORM ACTION (PARENT DOCUMENT)

1. Create a new FreeForm report.
2. If not the default, change the orientation to **Landscape**.
3. In the parent document, add the name of report and the date to the Page Header.



### NOTE:

It is always good practice to end the file name of the parent report with "par" and end the child report file name with "ch". If you have more than one child report, you may want to have the file names with "ch1", "ch2", and so on.

4. Add the page number and the document name you will assign to the report to the Page Footer area.
5. Select the following fields for your Parent report from the table below. Make sure that you put them to the left side of your design document:

BUSINESS VIEW: END ITEM SERIAL		
FOLDER(S)	DATA ELEMENT(S)	
<b>Catalog</b>	Stock Nbr	Nomen
<b>Serial_Hand_Receipt-Auth</b>	Serial Nbr	Acq Cost
<b>Hand_Receipt_Holder</b>	HRH Nbr Mjr	

6. To limit the information to the HRH Nbr Mjr of choice, we will filter on the HRH Nbr Mjr.
7. Click on the Filter icon.
8. Open the Detail folder.
9. Double-click on HRH Nbr Mjr to move it to the Object field.
10. Set the Operator to **"Like"**.
11. Enter **W\*** (cap locks on) in Value1.
12. Click Add.
13. Click OK.
14. Save your report as **PC-CDO-Parent**.
15. Process your report.

## Child Document

1. Create a new FreeForm report. If the parent report has been set to landscape, the child report must be set to landscape also. Otherwise, when you attach the Child to the Parent, it will not show up.
2. Select the following fields for your Child report from the table below. Make sure that the fields are placed approximately to the right of where the last field in parent was placed:

BUSINESS VIEW: DOCUMENT REGISTER	
FOLDER(S)	DATA ELEMENT(S)
<b>Doc_Nbr_HRH</b>	Doc Nbr HRH Nbr Mjr Stock Nbr

3. Add the file name you will assign to the report to the Page Footer area.
4. Save your report as **PC-CDO-Child**.
5. Process your report.

## **Child Prompts**

To make sure the child document returns information for the same row that the parent is looking at, a prompt is placed in the child document. The prompt input comes from the parent for each row. Visualize the parent looking for a row for serial number 105. The parent gives the serial number to the child prompt and the child pulls information for that row at the same time the parent is looking at that row.

We will be using HRH Nbr Mjr and Stock Nbr for the prompts.

1. Click on the **Prompt** icon.
2. For the Object Label, enter **HRH Nbr Mjr Prompt**
3. For the Prompt message, enter "**Enter HRH Nbr Mjr**".
4. Change the Character width to **6**.
5. Click OK and place anywhere in the Page Footer area.
6. Right-click on the Prompt icon and **Hide Toggle**.
7. Click on the Prompt icon.
8. For the Object Label, enter "**Stock Nbr Prompt**".
9. For the Prompt Message, enter "**Enter Stock Nbr**".
10. Change the Character Width to **15**".
11. Click OK and place anywhere in Page Footer area.
12. Right-click on the Prompt and **Hide Toggle**

## **Child Filters**

Once a prompt has been established, we must tell the child report how to limit data to the one serial number the parent has provided to the child prompt for each row the parent report retrieves. **The child filter is used for this purpose.**

1. Click on the **Filter** icon.
2. If not open, click on the **Objects** tab and open the Detail and Hidden Page folders.
3. In the Detail folder, double-click on the **HRH Nbr Mjr** to move it to the Object field.
4. Set the Operator to **= (equal)**.
5. In the Hidden Page Folder, double- click on **HRH Nbr Mjr Prompt** to move to Value1.
6. Click **Add**.
7. In the Detail folder, double-click on **Stock Nbr** to move it to the Object field.
8. Set the Operator to **= (equal)**.

19. In the Summary group, select **Sum**.

Chart Attributes	
<b>Draw Grid</b>	Select this check box to include grid lines in the output.
<b>Percentile Bar Chart</b>	Select this check box to have calculations expressed as a percentage of the overall total. For pie charts, which are always percentile charts, this item is called " <b>% of Total</b> " Labels and controls whether labels are shown as totals or percentages.
<b>Display Labels</b>	Select this check box if you wish to output labels along the axes of the chart. (Horizontal axis labels appear only when you use a Group By object.)
<b>Display Legend</b>	Select to show an index of the colors/patterns corresponding to different Area Labels column values. (Only available when you use a Group By object.)

20. Do not change Appearance.

Appearance	
<b>Snap To Grid</b>	This has been defined in Chapter 3.
<b>Hide</b>	This has been defined in Chapter 3.
<b>Append Parent's Filter</b>	<p>This has been defined in Chapter 4, Parent/Child.</p> <p>If you use the chart dialog box's Filter tab to define a filter, selecting this check box combines the two filters using an AND relationship – rows must meet both filters in order to be included in the chart.</p> <p>Unless you tell it otherwise, <i>Eureka</i> includes all database rows. To have your chart include only those rows that are included in your document, make sure that the Append Parent's Filter option is selected.</p>
<b>Native SQL Translate Value</b>	<p>This check box controls whether <i>Eureka</i> Reporter Designer</p> <p><input type="checkbox"/> Includes value translation requests as part of its query for chart information, or</p> <p><input type="checkbox"/> Performs value translations itself</p> <p>By default, <i>Eureka</i> does not include value translation requests as part of its query. Check this box to have it do so. When this is done, sorting and grouping are based on the translated value (when your database manager or ODBC database driver supports the SQL syntax required to do this). If you want sorting and grouping based on the untranslated value, make sure this box is not checked.</p>

21. Select the **Filter** tab.
22. Click on the **Objects** tab.
23. Double-click on the **HRH Nbr Mjr** to add to the Object.
24. Set the Operator to **Between**.
25. Set Value1 to **W1DC03**.
26. Set Value2 to **W1NW54**.

27. Click **Add**.



**NOTE:**

You can set a specific query filter to control which rows are included in the chart. To do this, select the Filter tab from the Chart dialog box.

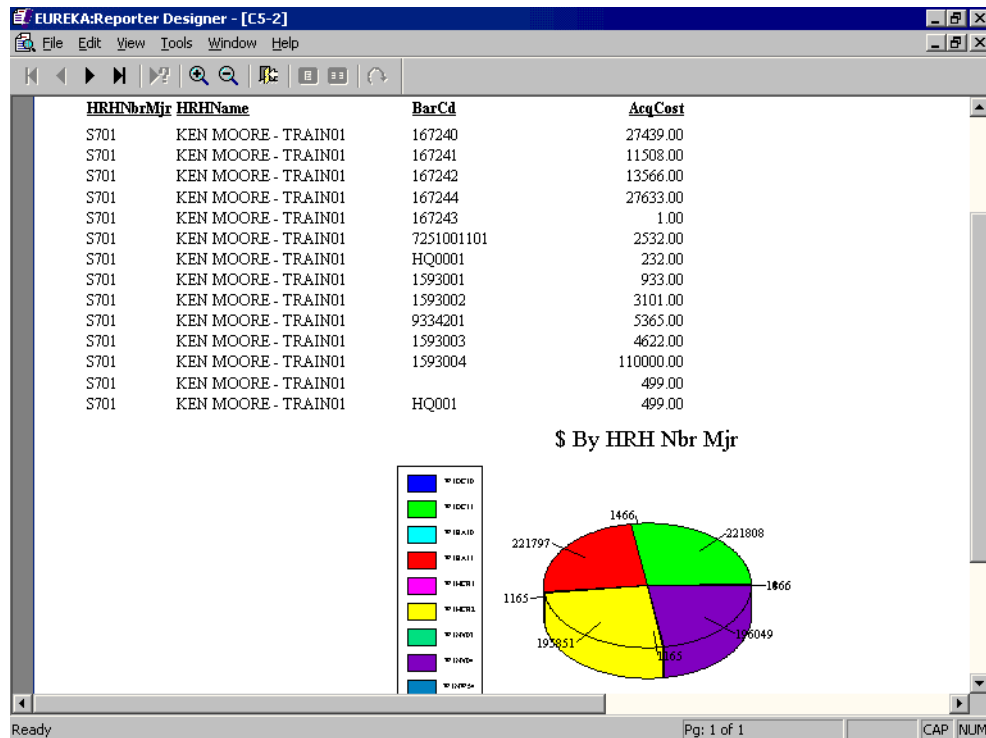
The entries you make on this tab affect which rows are included in your chart. They do not affect when the chart is included in your document. To set the conditions that affect when the chart is included, select the Output When tab.

If you both select Append Parent's Filter and set up a query filter using the filter tab on the Chart dialog box, the two filters work together. Only rows satisfying both filters will appear.

28. Click OK.

29. Save your report.

30. Process your report.



31. Close your report.



**Graphic Object.** This is used to place a bitmap image on your report.



**Chart Object.** This is used to place a chart on your report. This includes Bar, Pie, and Scatter charts.



**Crosstab Object.** This is used to provide an entire crosstab document in/on your report.



**Object Linking and Embedding (OLE) Object.** This is used to embed objects that are created by another application to your report.



**Child Document Object.** This is used to connect a *Eureka* document (child) that you include as part of another *Eureka* document (parent or another child).

### **FreeForm Queries Toolbar**



**Wizard Icon.** This is used to invoke the Wizard in FreeForm.



**Sort Icon.** This is used to sort the report by whatever data field is chosen by the user.



**Filter Icon.** This is used to apply search criteria to your report.



**Group Header Icon.** This is used to add a data Group Header Area at the **beginning** of your report. *This is not accessible until you select a column or custom object.*



**Group Footer Icon.** This is used to add a data Group Footer Area at the **end** of your report. *This is not accessible until you select a column or custom object.*



**Page Header/Footer Icon.** This is used to place data or text that will appear at the top or bottom of each page of your report.



**Document Header/Footer Icon.** This is used to place data or text that will appear on the **first** or **last** page of your report.



**Update FreeForm Layout Icon.** This rearranges all of your objects to form a neat, logical design after you have added columns to a FreeForm document by using a QuickQuery window.



## Menu Items

Menu items are grouped by functions; the File menu is for tasks such as opening and closing files, savings files and printing files.

### File Menu

File	
New...	Ctrl+N
Open...	Ctrl+O
Close	
New From Template...	Ctrl+T
Save	Ctrl+S
Save As...	
Page Setup...	
Print...	Ctrl+P
Print Setup...	
Print Preview	Ctrl+W
Export...	Ctrl+E
Report Server	
Send Mail	
1 Melanie-PDM.iqr	
2 C5-26.iqr	
3 C3-59.iqr	
4 C5-16.iqr	
Exit	

- ☐ **New** – Opens a new report
- ☐ **Open** – Opens an existing report
- ☐ **Close** – Closes the active report
- ☐ **New From Template** – Opens a template as model for new document
- ☐ **Save** – Saves the active report
- ☐ **Save As** – Saves the active report to a new name
- ☐ **Page Setup** – Sets up the layout, margins, and point defaults
- ☐ **Page Border** – Sets up the border parameters
- ☐ **Print** – Prints using your Windows default dialog box
- ☐ **Print Setup** – Sets up the print specification using the Windows dialog box
- ☐ **Print Preview** – Generates all pages for the formatted report and gives the ability to view the document before it is printed
- ☐ **Export** – Sends the report to a common separate file such as text, Excel, HTML
- ☐ **Report Server** – Executes queries on a database server
- ☐ **Send Mail** – emails the report to other users on the same mail server

### Edit Menu

- ☐ **Undo** – Reverses the last action
- ☐ **Redo** – Reverses an undo
- ☐ **Cut** – Removes a selected object
- ☐ **Copy** – Copies a selected object to the clipboard
- ☐ **Paste** – Places copied objects to the desired area
- ☐ **Paste Link** – Places a linked OLE object by pasting a non-*Eureka* Reporter Designer object from the Clipboard
- ☐ **Delete** – Removes the selected object
- ☐ **Select All Toggle** - Selects all the objects for editing, or deselecting
- ☐ **Hide Toggle** - Hides or reveals selected objects
- ☐ **Attributes** – Selects the current objects format
- ☐ **Border** – Displays border dialog box for the active window
- ☐ **Font** – Displays the font dialog box for the selected object
- ☐ **Hot Object** - Sets hot object attributes for selected objects
- ☐ **HTML** - Sets HTML attributes for selected objects
- ☐ **Output When** - Sets Output When attributes for selected objects
- ☐ **Translate Value** – Invokes the translate value dialog for the active window
- ☐ **Prompt SQL** – Edit the SQL query associated with a user prompt object
- ☐ **Prompt Connection** - Changes the database connection for a selected user prompt object

Edit	
Undo	Ctrl+Z
Redo	Ctrl+A
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Paste Link	
Delete	Del
Select All Toggle	
Hide Toggle	
Attributes...	
Border...	
Font...	
Hot Object...	
HTML...	
Output When...	
Translate Value...	
Prompt SQL...	
Prompt Connection...	
Object	

## Chart Types

### Bar Chart

The screenshot shows a control titled "Bar Chart Data" with five input fields:

- Bar Data: [ ]
- Bar Labels: [ ]
- Group by: (optional) [ ]
- Horiz Axis Title: [ ]
- Vert Axis Title: [ ]

- ❑ **Bar Data** - Place the object for which you want to summarize values in the Bar Data control. This object determines the height of the bars.
- ❑ **Bar Labels** - Place the object for which you wish to see bars in the Bar Labels control. A different bar will be calculated for each value in this object.
- ❑ **Group By** - In the Group By control, place the object you wish to group by, if any. *Eureka* creates a different group of bars for each value in this object. Each group includes one bar for each value in the Bar Label object. Each bar represents the calculated value for the Bar Data object for a single particular combination of Bar Label object value and Group By object value.

For instance, if the Bar Labels object is Class and the Group By object is Sport, there will be one group of bars for each sport. Each of the groups will have one bar for each different Class value. For two-dimensional charts, the groups are placed next to each other. For three-dimensional charts, the Group By object is used as the X-axis and the Bar Label object is used as the Z-axis. If there were no Group By object, there would be a single group of bars.

- ❑ **Horiz Axis Title** - Enter a label to describe the Bar Labels object or the Bar Labels and Group By objects.
- ❑ **Vert Axis Title** - Enter a label to describe the Bar Data object.

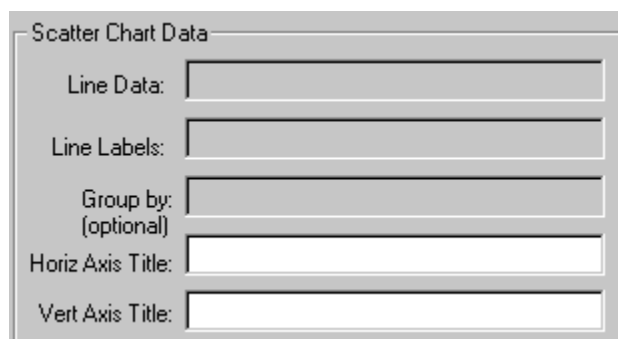
### Pie Chart

- ❑ **Pie Slice Values** - This is the object that controls the size of the pie slices.
- ❑ **Pie Slice Labels** - There will be a slice calculated for each value in this object.

The screenshot shows a control titled "Pie Chart Data" with two input fields:

- Pie Slice Values: [ ]
- Pie Slice Labels: [ ]

## Scatter Chart



Scatter Chart Data

Line Data:

Line Labels:

Group by:  (optional)

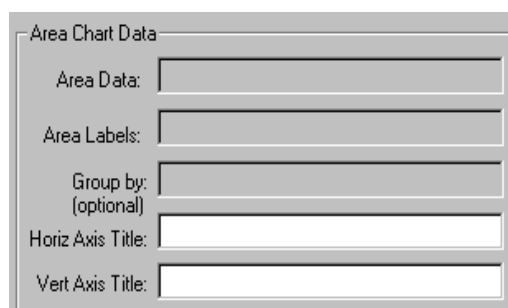
Horiz Axis Title:

Vert Axis Title:

- ❑ **Line Data** - Place the object for which you want to summarize values in the Line Data control. This object controls the point heights – it is the Y-axis object.
- ❑ **Line Labels** - In the Line Labels control, place the object for which you wish to calculate points. The object is the X-axis object unless you use a Group By object, in which case it becomes the Z-axis object. (Since scatter charts are two-dimensional, the Z-axis points are differentiated from each other by color.)

- ❑ **Group By** - Add a Group By object if you want to chart three separate objects. *Eureka* creates a different set of points on the chart for each value in this object. This object is used as the X-axis object.
- ❑ **Horiz Axis Title** - Enter a label to describe the Line Labels object or Line Labels and Group By objects.
- ❑ **Vert Axis Title** - Enter a label to describe the Line Data object.

## Area Chart



Area Chart Data

Area Data:

Area Labels:

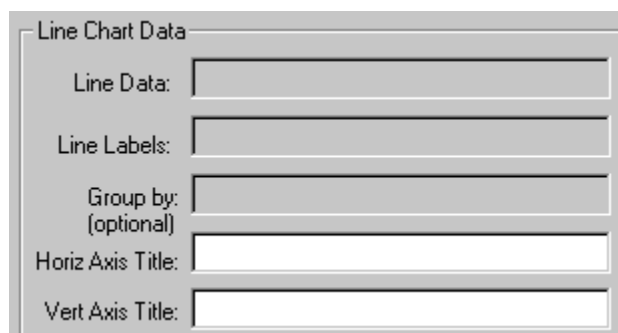
Group by:  (optional)

Horiz Axis Title:

Vert Axis Title:

- ❑ **Area Data** - Place the Y-axis object in the Area Data. This is the object for which areas are plotted (i.e., it is the object which you want to summarize).
- ❑ **Area Labels** - Place the X-axis object in the Area Labels control. If you are using a Group By object, place the Z-axis object here. There will be an area calculated for each value in this object.
- ❑ **Group By** - In the Group By control, place the object you wish to group by, if any. The Group By object is used as the X-axis object and the Area Labels object is used as the Z-axis object.
- ❑ **Horiz Axis Title** - Enter a label to describe the Area Labels object or the Area Labels and Group By objects.
- ❑ **Vert Axis Title** - Enter a label to describe the Area Data object.

## Line Chart



Line Chart Data

Line Data:

Line Labels:

Group by:  (optional)

Horiz Axis Title:

Vert Axis Title:

- ❑ **Line Data** - Place the object for which you want to summarize values in the Line Data control. This object controls the line height – it is the Y-axis object.
- ❑ **Line Labels** - In the Line Labels control, place the object for which you wish to calculate points along on the line(s). There will be a separate point plotted for each value in this object. This is the X-axis object unless you use a Group By object, in which case it becomes the Z-axis object.

- ❑ **Group By** - When you place an object here, *Eureka* uses it as the X-axis object. (A separate line is drawn for each value in the Line Labels Object; it becomes the Z-axis object.) Each line has points plotted for each separate value in the Group By object.